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ABSTRACT

A handbook for participants of a workshop on bilingual program evaluation is presented as part of the Bilingual Evaluation Technical Assistance project. Workshop objectives are as follows: make a schedule for evaluation management tasks; create a staffing plan; prepare a budget appropriate for the particular bilingual evaluation; develop a plan for monitoring bilingual evaluation tasks; and prepare a report schedule. Instructions and worksheets are presented for each of these tasks. A general workshop schedule for the 4 hours of instruction is also included. (SW)

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ED227677

Bilingual Evaluation Technical Assistance

Workshop V

Planning for Management

Participant's Handbook

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GENERAL WORKSHOP SCHEDULE

This workshop has been designed to accomplish its objectives within four hours of instruction. Below you will find a general time schedule and the times allotted for each activity. Please detach this page for use during instruction.

Morning Workshop	Time	Activity
	8:00-8:20 AM	Coffee, introductions
	8:20-8:40	Bilingual programs and evaluation, introduction
	8:40-8:50	Presentation of Simulation
	8:50-9:15	Exercise #1: Identification of three major problem areas in evaluation bilingual programs
	9:15-9:45	The CSE and BETA evaluation models: discussion
	9:45-10:00	Methodological issues in evaluation: discussion
	10:00	Break
	10:30-11:15	Exercise #2: Needs Assessment
	11:15-12:00	Exercise #3: Program Planning
	12:00	Lunch
Afternoon Workshop		
	1:00-1:45 PM	Exercise #4: Formative evaluation
	1:45-2:15	Exercise #5: Summative evaluation
	2:15-2:30	Discussion
	2:30-2:45	Participants' evaluation of Workshop I

Workshop Objectives

1) Make a schedule for evaluation management tasks.

2) Create a staffing plan.

3) Draw up a budget appropriate for your particular bilingual evaluation.

4) Create a plan for monitoring bilingual evaluation tasks.

5) Make a reporting schedule.

Exercise 1

WORKSHEET 1: Scheduling

Step 1. Fill in the months, beginning with the program start date. You can plan the schedule for either a single-year or a multi-year project. It is recommended that you work with a multi-year period only if the activities vary significantly from one year to the next.

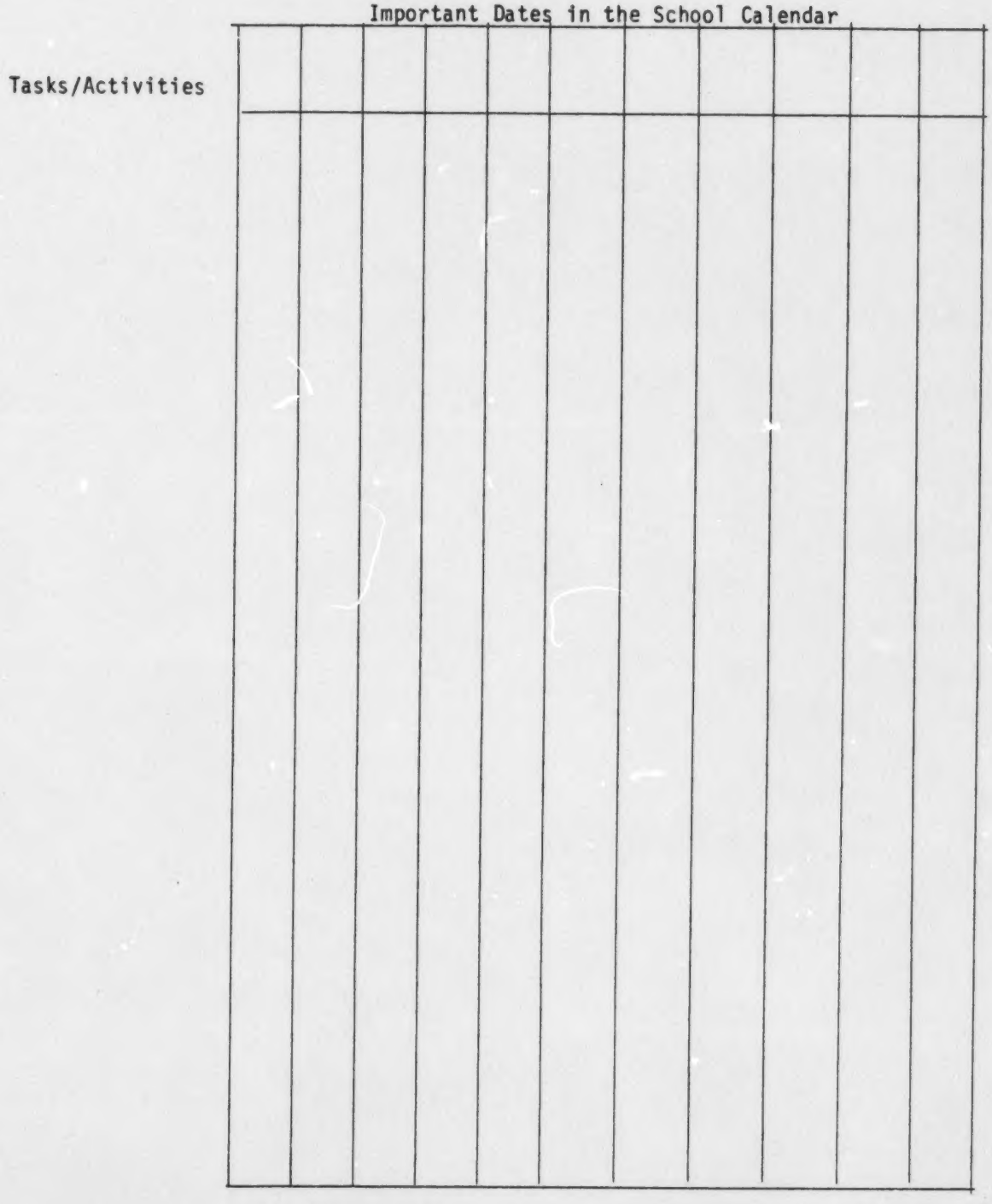
Step 2. In the "Important Dates" section, record school calendar dates such as holidays, vacations, assemblies, and other special events. Also indicate when recommendations for program improvement should be made and when meetings with the school board and parents and other local groups will occur.

Step 3. Write out the evaluation tasks and activities. If you have trouble identifying them, start with the major ones such as testing and report writing and work backwards from there. See Chart 1 for a listing of typical evaluation activities.

Step 4. Determine when each task will start and end. This decision requires that you consider several different pieces of information. For example, check the school calendar before setting dates for testing students. Then, during the school year, request to be informed of changes in the instructional schedule which might affect your plans. Be sure to allow enough time before testing to allow for developing or ordering tests and for distributing the materials. Also consider the amount of time after testing and before the results are due for activities such as scoring and interpreting results. If the testing instruments are to be developed locally, allow time for trying out the instruments and making any necessary revisions.

WORKSHEET 1

PLANNING AN EVALUATION SCHEDULE



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WORKSHEET 2: Staffing

Step 1. List the evaluation tasks and activities, including subtasks whenever possible.

Step 2. Identify the types of people needed to carry out the work.

Step 3. For each task, decide on the type of personnel needed and estimate the number of workdays necessary for each person to do the task. When identifying personnel for your own program, we recommend that the planning be done jointly by the program administrator, evaluator, and instrucitonal staff. As with the process of developing the evaluation schedule, all of these people will be involved in the evaluation and so should share in making decisions about how and by whom it will be carried out.

WORKSHEET 2

IDENTIFYING PERSONNEL NEEDS

Tasks/Activities								

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WORKSHEET 3: Budgeting

You should select one of the following two exercises. The first option is preferred but takes longer to complete. The second one is more appropriate only if the time available is limited.

Option 1. This exercise is designed to help you build a budget from scratch. It uses the information generated in the first two exercises and requires that you have Worksheets 1 and 2 in front of you. To complete Worksheet 3:

Step 1. Set the program and evaluation constraints and contingencies for your example. You might want to review the material on this topic presented earlier as well as check your notes on Worksheets 1 and 2.

Step 2. Using your resource chart (Worksheet 2), transfer the level of effort of each person in the evaluation to the appropriate section of Worksheet 3. Estimate daily rates and, where appropriate, benefit rates. Calculate a total for each person.

Step 3. Identify the basic costs of the evaluation other than personnel and estimate the unit cost and number of units (e.g., photocopy cost per page and number of pages to be copied). Refer to the text and Figure 3 as needed.

Step 4. Now consider the costs associated with the type of design you have selected. List each design feature separately. For each feature, estimate the costs for personnel, materials, and other items needed for implementation.

Step 5. Calculate the total for each budget category (e.g., personnel, travel), transfer the figures to the budget summary, and obtain a total evaluation cost.

Step 6. If time permits, consider how and where the budget could be reduced if you had to cut 15 percent from the overall amount. What changes in the evaluation plan are needed to be able to make the reductions?

Option 2. This exercise continues the example presented in the budget section, i.e., how can the program administrator obtain the evaluation he/she wants with the $16,000 budget available. Using the information in Figures 1 through 4, propose ways in which the evaluation plan and personnel can be modified to fit the budget constraints. Do your calculations directly on the figures and indicate the trade-offs that have to be made. Work in your small groups, then share your results with the other groups. Consider the following questions in your discussion:

Were there items in the budget or resource chart that needed to be revised up or down on the basis of your own experience?

Was $16,000 a reasonable figure for doing the evaluation?

Was it possible to meet the program administrator's needs with the budget available?

WORKSHEET 3

CALCULATING A BUDGET

Program and evaluation contingencies and constraints:

1. Personnel Salary and Benefits

Persons	# Days	Daily Rate	Salary $	Benefit $	Total

2. Consultant

Persons	# Days	Daily Rate	Total

3. Travel

4. Other Costs

Item	# Needed	Unit Cost	Total

5. Costs Associated with Evaluation Design

6. Budget Summary

Personnel Salary and Benefits

Consultants

Travel

Other Costs

Design Costs

TOTAL

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WORKSHEET 4: Monitoring

Step 1. Fill in the tasks/activities form Worksheets 1 and 2 that need to be monitored.

Step 2. Fill in the individual(s) responsible for task completion from Worksheet 2.

Step 3. Determine criteria for judging adequacy of the task completed. Among the possible criteria are timeliness of completing the task, cost of completing the task, quality of the product of the task. Discuss these kinds of criteria, and others that are appropriate depending on the nature of the task, with the staff responsible for task completion. The result of this discussion should be a set of negotiated criteria that will ensure timely and effective completion of the project, in a manner that instills cooperation among administration and line staff.

Step 4. Determine the most appropriate means of monitoring on-going completion of the task, and the time(s) at which this kind of checking will occur. DO NOT wait until the task or product is completed to determine its quality. Rather, on the basis of final performance criteria decided upon in Step 3 above, work backwards and decide at which points in time, and on the basis of what kinds of evidence, would on-going work be considered adequate. Again, discuss these monitoring activities with the staff involved. For example, if the task involves a written product, early submission of draft work for review would be appropriate; if the final task involved data analysis, early discussion of alternative means of analysis would be appropriate; if the task involved a series of inservice activities to be provided by senior staff to junior staff, early observation would be appropriate, as would discussion with those who receive

the training as to its appropriateness and quality. THE POINT IS SIMPLE: GET APPROPRIATE INFORMATION IN SUFFICIENT TIME TO USE IT TO DECIDE IF THE PROJECT IS PROCEEDING AS PLANNED OR IF IMPROVEMENTS ARE NEEDED.

Step 5. Determine the most appropriate form of communication/feedback to the individual responsible for task completion. For example, quality/timely work should be rewarded routinely; where improvements are needed, criticism should be offered constructively. AGAIN, THE EARLIER FEEDBACK IS PROVIDED TO STAFF, THE MORE CONSTRUCTIVE IT CAN BE AND THE MORE LIKELY IT WILL BE ACTED UPON.

Step 6. Based on the information gathered in the above monitoring activities, revise previously set timelines and budgetary projections as appropriate. For example, it may be that the number of people and dollar resources projected to meet a certain task were simply unrealistic; if so, reallocation of people and money will need to be considered. On the other hand, it may be that a certain task is being completed in less time and perhaps with less staff and monetary resources than anticipated. Should this occur, reallocations can then be made to project components that might be improved with released staff/money. AGAIN, THE SOONER YOU GET AN ANSWER TO THESE KINDS OF QUESTIONS, THE SOONER YOU CAN USE RESOURCES OF STAFF, TIME, AND MONEY MOST EFFECTIVELY.

This Step cannot be done in the Workshop since it occurs only after monitoring information has been gathered. It is included here since it is the end product of monitoring--what you would do in a real situation.

WORKSHEET 1: MONITORING

TASK/ACTIVITIES	INDIVIDUAL(S) RESPONSIBLE	FINAL PERFORM-ANCE CRITERIA	MONITORING TECHNIQUE/TIME	COMMUNICATION/ FEEDBACK	REVISIONS TO PLANNED TIME-LINES, USE OF RESOURCES

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WORKSHEET 5: Reporting

Step 1. Identify the audience(s) for the report. If there is more than one audience, and this is often the case, you may need to plan alternate means of reporting. For example, parents will probably not respond too positively to page after page of summary data. Funding agencies may not be too interested in reading "testimonial" data; parents may be interested in such data, however.

Step 2. Determine what kind of information the audience(s) needs. Plan to report only that information which would address the audience's possible questions about the program, which is relevant to those questions, and is presented in a manner appropriate for the particular audience.

Step 3. Determine the time(s) when the audience(s) will need information. For example, it may not be wise to leave a school board completely uninformed about the program until it has been completed; periodic reporting will probably be more effective. Further, if you expect feedback from the audience, (1) give them information in sufficient time to review and respond to you so that (2) you leave yourself enough time to use the information they provide you. (NOTE: USING THIS KIND OF INFORMATION, AND THEN GOING BACK AND INFORMING THE PROVIDER OF THE INFORMATION AND OF HOW YOU USED IT, IS ITSELF A USEFUL FORM OF PROGRAM REPORTING.)

Step 4. Decide what kinds of information would be credible for your audience(s). That is, what kind of information would they consider as evidence of program accomplishment? For example, someone familiar with the program might be satisfied with anecdotal information, or other kinds of informal information. Others less familiar with the program, or those

who would tend to be critical of the program, might only be satisfied with formal, systematically collected information. Regardless of familiarity with or support of the program, some people tend to find only quantitative, "hard" data as being credible, while others may prefer more qualitiative, "soft" data showing program processes. Some audiences may require your attention to both kinds of information--and they are both useful.

Step 5. Determine the most appropriate reporting technique. For example, a teacher may be more interested in hearing a verbal report of student progress, perhaps supported with straightforward visual overheads that show how his/her students compare to similar students. A school board may prefer a short and succinct executive summary describing the program, its processes, and its accomplishments, supported by technical data in a separate report or appendix.

Step 6. Select criteria for judging the effectiveness of the report. Some possible criteria are suggested for you in Figures 8 and 9.

WORKSHEET 5: REPORTING

AUDIENCE(S)	INFORMATION NEEDS	TIME NEEDED	CREDIBILITY	REPORTING TECHNIQUE	CRITERIA

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PARTICIPANT EVALUATION OF WORKSHOP

Workshop title: _____

Position/Job title: _____

Date: _____

Please place a check in the space below each question that summarizes your opinion about the materials used for this workshop.

I. 1. The materials are helpful for evaluators who are not familiar with specific problems in evaluating compensatory and specially funded programs.

_____very _____adequately _____somewhat _____not at all

2. The materials are helpful for people with no experience in evaluation.

_____very _____adequately _____somewhat _____not at all

3. The purpose of the workshop was communicated clearly in the materials.

_____yes _____no

4. Content was presented in a logical, easy to follow order.

_____yes _____no

5. The order of presentation of topics in the text promoted retention.

_____very much _____adequately _____somewhat _____not at all

6. The content in the workshop was new to you.

_____yes, completely _____yes, mostly _____no, most was familiar; no, all familiar

7. The language of the materials was appropriate for the audience.

_____yes _____no

II. 1. How practical do you think the information in the text is to your evaluation on training needs?

_____very _____rather _____difficult to see its use _____no utility

2. What would be your recommendation to a colleague regarding these materials?

_____strongly recommend _____recommend _____not recommend

_____strongly not recommend

III. COMMENTS

1. What are the strongest sections of the text? _____

_____

_____

2. What are the weakest sections of the text? _____

_____

_____

3. What topics need to be included? _____

_____

_____

4. Other _____

_____

_____

_____

_____

_____